

## SECURE DOCUMENT EXCHANGE FACTS

**This is an overview of everything regarding secure document exchange. We recommend storing this document in an accessible location on your computer, so you may refer to it at any time. The transmissions to and from Verifyle in your client portal (AKA workspace) are encrypted using military-grade encryption. The files are also encrypted while in storage at the datacenter. Verifyle uses a patented encryption system where each item in your workspace has six different encryption keys and is sandboxed. This means that a hacker would have to break through 6 different encryption levels per file to see each individual file.**

Once your account is set up by me, you will receive an email from Verifyle. It will assign you a really secure random password, which you may choose to keep or change. I recommend keeping it if you have a password manager. You can also set up two-factor authentication. This will be a one-time event. Your user name will be your email address. Once you are in the system, you are a user. You can retrieve or upload documents with your password from then on. If you forget the password, there will be a link to request a new one when you login.

If you want to upload a document, please use the “send me secure documents” link below my email signature and transmit the document to us. The link takes you to the Verifyle login page where you will enter your user name and password. After you do that, you will arrive at your main Philtax portal page. Using a secure method to transmit files is for your own protection. I cannot force you to do this. All I can do is provide advice which helps to protect your identity. Sending me something as an email attachment is absolutely not secure. If you cannot find an email from me with the link to send me a document, here is the login page info:

<https://verifyle.com/login/>

The advantage of the portal is that I can store electronic copies of your tax returns or other documents there securely for your retrieval at any time necessary. You now have a stored secure location for your tax return copies. You can also place large files like QuickBooks files in it for me to retrieve. You will also be able to access it from the Philtax website by clicking the “Client Portal” tab on top of every page. You can access it from any device at any time. Accessing the portal via the Philtax website is one of the easiest ways of arriving at your portal. When you click on “Client Portal,” you will be redirected from the Philtax website to the Verifyle login screen for your portal.

Verifyle also has apps for iOS and Android which you can use on your mobile devices. I have not evaluated them, as my own preference is to use it on a computer. You can explore them if you wish.